

# GENERAL AGREEMENT ON

## TARIFFS AND TRADE

RESTRICTED  
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Special Distribution

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Arrangement Regarding Bovine Meat

Original: French

### INTERNATIONAL MEAT COUNCIL

#### Inventory of Domestic Policies and Trade Measures and Information on Bilateral, Plurilateral or Multilateral Commitments

#### Replies to Parts G and H of the Questionnaire

#### TUNISIA

#### Revision

The participants have agreed to provide information concerning their domestic policies and trade measures including bilateral and plurilateral commitments on the basis of Parts G and H of the Questionnaire (Rule 16 of the Rules of Procedure). The documents containing replies to these parts of the Questionnaire are circulated under the symbol IMC/INV; they will be revised as and when changes are notified.

This set of documents constitutes the inventory of all measures affecting trade in bovine meat, including commitments resulting from bilateral, plurilateral and multilateral negotiations, which the Council has instructed the Secretariat to draw up and keep up to date, under the provisions of Article III of the Agreement (Note to Article III of the Arrangement and Rule 18 of the Rules of Procedure).

PART GPart G1: Information on Domestic Policies and Trade Measures

Cattle farming continues to be of great importance in agriculture, particularly in the northern regions of the country where 80 per cent of the herd is to be found, owing to the plentiful fodder resources and the proximity of urban centres which underpins the marketing and processing of meat and dairy products.

In the centre and south, cattle farming is confined to the irrigated perimeters, in particular near the major urban centres (Sfax, Sousse, Kairouan and Gabès).

During the Seventh Plan (1986-1991), results in terms of herd expansion fell short of forecasts: the average rate of increase was less than 0.46 per cent compared with the planned 4.17 per cent. This is attributable firstly to the two successive drought years (1987-1988 and 1988-1989) which essentially affected the herds of the local population, and secondly to poor prices, in particular for meat, until 1990 when domestic beef prices were deregulated. The number of pure-bred animals increased at an average rate of 4.5 per cent annually compared with the planned 11 per cent annually. This increase (4.5 per cent) stems from imports of in-calf heifers effected annually in order to improve dairy production, rather than from autonomous herd increase.

The trend in the numbers of female bovine animals from 1987 to 1992 is as follows:

Year	1987	1988	1989	1990	1991	1992
Female Bovine Animals						
Pure-bred	87,500	92,000	96,000	100,000	104,000	108,000
Local and Cross-bred	267,900	255,000	248,600	243,900	253,500	254,000
TOTAL	355,400	347,000	344,600	344,000	357,500	362,000

Bovine meat production fell below the targets of the Seventh Plan except in 1987, when it increased by 4 per cent.

At the start of the Plan producer prices were relatively profitable, which encouraged relatively regular development of beef production. As from 1988, following the drought, feeding-stuff prices (fodder and straws) increased sharply. Meanwhile, the fixing of retail prices for meat (Ministerial Circular of 17 February 1988) meant that cattle farmers lost almost all interest in the fattening and valorization of cull cows. At the same time, the slaughter of bovine animals belonging to livestock farmers hit by the period of fodder shortage accelerated sharply. This situation lasted until September 1990 when retail prices of local beef were deregulated.

Production then rose from 38,950 tonnes in 1990 to 40,900 tonnes in 1991 and 43,350 tonnes in 1992, giving a rate of increase of about 5 per cent (1990-1991) and 6.2 per cent in (1991-1992). This relatively satisfactory increase reflects the recovery of cattle-fattening activity despite the liberalization of imports in July 1990.

Bovine Meat Production  
1987-1992

Meat	Year	1987	1988	1989	1990	1991	1992
Meat + offal		38,200	38,500	38,300	38,950	40,900	43,350
Meat excluding offals		33,200	33,500	33,300	33,900	35,500	37,700

However, given the importance of domestic demand for beef and milk, under the Eighth Plan (1992-1996) cattle farming is to develop considerably so as to be able to cover domestic consumption completely by 1996 (assuming that per capita consumption remains constant at 19 kg. per year from 1992-1996).

The Eighth Plan targets for bovine meat production are as follows:

Production	Year	1992	1993	1994	1995	1996
Bovine meat (including offals)		43,350	44,950	47,000	49,500	52,100
Total meat production (including poultry)		154,070	158,463	163,669	169,095	174,918
National consumption requirements		165,877	163,931	166,832	169,846	175,484
Shortfall		11,807	5,468	3,163	751	566
% Coverage		92.9	96.7	98.1	99.55	99.7

In order to attain these forecasts, the Eighth Plan envisages that the following production factors will be used optimally:

1. Increase in herd size:

The cattle herd should increase from 357,500 female animals, including 104,000 pure-bred animals, in 1991 to 366,000 female animals, including 125,000 pure-bred animals, in 1996.

2. Increase in feeding resources

The overall requirements of the national herd at present are estimated at 3,873 million feed units FU/year. They are evaluated at 4,638 million FU/year in 1996.

There is currently a shortfall at about 1,000 million FU for an average year, and of almost 50 per cent of requirements in a drought year. In order to overcome this shortfall and meet the additional requirements of the national herd in years to come, a special effort must be made with regard to:

(a) fodder production:

Extension of areas sown to fodder crops instead of being left fallow, introduction of high yield varieties, integration of cattle farming with cereal farming, and improvement of forest and non-forest common grazing land.

(b) Improvement of the quantity and quality of concentrated feeds, and gradual replacement of imported maize by local barley and triticale.

3. Improvement of results

Current bovine meat production performance is poor and leaves much room for improvement. Research has shown that this is quite feasible provided a number of measures are taken relating to feeding, genetic improvement and slaughter-weight controls.

4. Improvement of sanitary coverage

(a) Strengthening of Government veterinary services:

- by providing them with the means to do their job;
- by strengthening the veterinary presence in the production areas in the west and south of the country;
- by reinforcing the network of regional laboratories and providing them with the necessary equipment.

(b) Encouragement of privatization of veterinary medicine, by providing start-up loans on soft terms.

(c) Reduction of the cost of veterinary products and care:

- by breaking the drug import monopolies;
- by cutting out intermediaries (wholesale pharmacists);
- by revising import duties on these products.

The Eighth Plan also provides for the implementation of a number of additional measures, as follows:

1. Technical measures

(a) Combating clandestine slaughtering;

(b) Strengthening the slaughterhouse infrastructure, and avoiding putting them in private hands;

- (c) Strengthening laboratories specializing in quality control of food products;
- (d) Encouraging the creation of meat cutting and processing units.

2. Economic measures

- (a) Continually updating retail prices of imported meat so as to keep them in line with local bovine meat prices;
- (b) Standardizing slaughter taxes at municipal level;
- (c) Requiring butchers to display meat prices according to origin (local or imported);
- (d) Revising scales of loans for fattening, and including slaughter cows.

3. Legislative measures

- (a) Amendment of Law No. 66-64 of 1966 and Decree No. 81-1453 of 10 November 1981 in order to introduce a classification of carcasses at slaughter-house level and of meats at the butcher's level.
- (b) Enactment of new provisions dealing with approval of slaughter houses and display of meat prices in butcher's shops.

4. Institutional measures

- (a) Creation of an interprofessional meat group to organize production, processing and marketing channels, improve the moral standards of the market and establish service co-operatives to help producers.
- (b) Encourage the establishment of young technical specialists in production and service activities.
- (c) Strengthen extension activities and establish a closer link with education and research, which must be involved in the extension programmes.

PART H

Part H: Information on Bilateral or Plurilateral Agreements in the Field of Bovine Animals, Meat and Offals

Tunisia has been a member of the International Office of Epizootics since its establishment.

Tunisia has not entered into any bilateral or plurilateral commitments in the bovine meat sector.